Adviser sheet — before the meeting

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

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Fictional document

> **Fictional document — demonstration example**
> This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

> **Fictional document**, produced for demonstration. **The only view expressed in this sheet concerns a risk of overlapping cover**, not a choice of product. The difference is not one of degree: flagging that cover may be paid for twice protects the client; saying which one to take is an act of advice.

> **Flagged at the top: risk of overlapping cover.** The file holds the certificate of a legal expenses policy taken out with a competitor in 2023. Two of Complete's three differences overlap with that cover. **To be checked before any sales meeting.**

Three questions to ask

#	Question	What it unlocks
1	Is the 2023 legal expenses policy still running?	The overlap, or its absence
2	What value would you put on the items you want covered?	The third product difference

#	Question	What it unlocks
3	What made you ask this now?	The real need, which is not always the one in the question

What the sheet reminds the adviser

Point	Reminder
Needs assessment	To be recorded before any recommendation
Written trace	Advice given is justified in writing
Claim declined in 2024	Likely to come up in the meeting

The email drafted for the client

"Hello, we have received your question about the Comfort and Complete covers.

Attached is the comparison table for the two, exactly as it appears in our policy wording.

Choosing between them means looking at your situation, and in particular at cover you may already hold elsewhere. Your adviser proposes a meeting on …… . They will call you before then."

> **This email compares nothing and suggests nothing.** It acknowledges within the day, attaches the plain document and sets a date — which beats six days of silence followed by perfect advice.

The volume, for context

This quarter	Count
Emails asking a question of this type	**47**
Average reply time	6 days

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This quarter	Count
Still unanswered	**11**

Eleven clients with no reply costs more than advice deferred. That is the only argument for the automation proposed, and it covers the acknowledgement only.

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> https://bluelemonagent.ai/en/entreprises/secteurs/agent-ia-banque-finance-assurance

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